

Using expert reports to provide additional power to your interpretation of personality results

Anne Herrmann, OPP Ltd

The increased use of computer-based and online assessment has led to new possibilities for providing respondents with interpretations of their psychometric results. In the area of personality assessment, computer-generated narrative reports have become increasingly popular, as they have many clear advantages over hand-written reports. Using the 16PF questionnaire and its reports as an example, this paper describes the advantages and the added value that expert reports offer the practitioner *and* the respondent in the application and interpretation of personality assessments. Finally, the paper outlines the opportunities that tailored expert reports offer to practitioners.

Providing feedback on the results of psychometric assessments

Providing feedback is considered best practice for the application of psychometric assessments^{1, 2}. The need for good feedback has also been emphasised in the context of computer-based assessment³. This is particularly relevant in online assessment, as the contact between practitioner and candidate is minimal during the administration of the assessment. With online assessment being ever quicker to manage, the practitioner and respondent still have an 'offline' relationship to maintain through which the practitioner should still uphold standards and share results with the respondent.

Feedback is crucial in the application of psychometrics because it is one of the most memorable parts for the respondent. Whereas the completion of a psychometric assessment mainly involves the respondent revealing something about themselves, it is through meaningful feedback that the respondent can really benefit: it enhances their self-awareness and helps them to get to know themselves better – insight that is hugely beneficial and applicable, not only to a respondent's working life but also to their personal life.

In fact, feedback has been shown to be one of the aspects identified as important by applicants, in terms of the way they expect to be treated during a selection process⁴. Giving feedback is therefore not only about complying with professional standards, but also about fulfilling the expectations that candidates have when they enter a selection process and are asked to complete psychometric tools.

In addition to face-to-face feedback, it is desirable to offer a narrative report that documents the results for a respondent to keep at the end of the feedback process. This ensures that the respondent can get maximum development from the insights that the psychometric questionnaire has provided.

Hand-written reports

In the past, reports were usually hand-written by the practitioner and were mainly based on results obtained from a paper-and-pencil administration of a questionnaire. These reports were usually written for a particular audience, eg for the respondent or for other stakeholders.

Advantages of hand-written reports

- The reports are adaptable to the purpose of the assessment; the practitioner can produce a fully adapted report, depending on what the results are to be used for (selection or development) and on the intended audience (the respondent, the manager or other stakeholders).

¹ BPS Steering Committee on Test Standards, 1995

² British Psychological Society, 2005

³ International Test Commission, 2006

⁴ Derous, Born & De Witte, 2004

- The reports can be generated based on the results from either hand-scored or computer-scored questionnaires. As a starting point, the practitioner merely needs a profile of the respondent's scores in order to form an interpretation of the results that then shape the content of the report.

However, there are some major disadvantages of hand-written reports. These concern both utility and quality.

Disadvantages of hand-written reports

Utility for the practitioner

- Producing hand-written reports is a very time-consuming task for the practitioner, particularly when a larger number of individuals are assessed. The demands on the practitioner's time can make it impossible to provide a comprehensive written account of the results in addition to the time spent in the one-to-one feedback.
- Writing many individual reports suitable for the respective stakeholder (practitioner, respondent, manager, etc.) in terms of content and language requires considerable additional time and effort for the practitioner.
- Taking into account the practitioner's time filled with creating reports, once that time is costed, hand-written reports soon become rather expensive.

Quality of the content

- As the content of a hand-written report relies solely on the practitioner's expertise, great variation in quality of reports is experienced and high-quality interpretation cannot be guaranteed.
- Hand-written reports are more likely to contain errors with regard to the interpretation as well as the accuracy of presenting the findings. While some reports may be well-written and the results interpreted appropriately, there is the risk that some information provided in the profile is not considered, or that some written statements are too strong or too weak.
- If written under time pressure, the practitioner may not have the opportunity to interpret the result in depth, and the quality of the report may suffer.
- The thorough interpretation of score combinations (ie explaining behaviour based on the scores on two or more scales) is less likely if the report is hand-written. As this level of interpretation is more complex, it is highly dependent on the practitioner's expertise and the time available when writing the report.
- One important aspect in the application of psychometric tools is the objectivity of the assessment. Great emphasis is placed on ensuring that the obtained results are not affected by subjective influences. However, once the results of a psychometric assessment are established as objectively as possible, the danger exists that a certain subjectivity is introduced by the practitioner when interpreting the results and writing a report. A report based on the same profile will look very different when written by two different practitioners producing their interpretation. This potentially considerable variation in content due to subjective interpretation is therefore contrary to the effort to apply objective judgment.
- Depending on the practitioner's proficiency, the use of graphs and visualisations to display results may be limited.

The numerous disadvantages outlined make it less appealing for practitioners to generate hand-written reports. Furthermore, the increase in computer-based questionnaire administration offers practitioners the opportunity to use computer-generated reports – or 'expert reports'.

Expert reports

Expert reports are off-the-shelf solutions to interpreting assessment results. They are computer-generated reports based on the results of a psychometric questionnaire. Expert reports contain the scores (often displayed in a graph) and often also statements (narrative sections) that provide the practitioner and potentially other stakeholders (eg respondent, manager, etc.) with an interpretation of the respondent's results.

The increased use of expert reports, both in selection and development settings, has occurred due to their abundant advantages, both in terms of the utility and the quality that expert reports bring to the practitioner and other stakeholders.

Advantages of expert reports

Utility for the practitioner

- Using expert reports saves a great deal of time for the practitioner in producing the report. This means that their valuable time can be spent preparing for and giving feedback to the respondent – a crucial part of the process.
- Several versions of the report can be generated simultaneously for different stakeholders (respondent, manager and practitioner). Providing these audience-specific interpretations does not require additional time or effort for the practitioner, but increases the value for all individuals involved in the following ways:
 - A report version for each group can be developed that differs in terms of the content as well as in the way the results are presented. For example, the report for the trained audience would contain information on scores, whereas reports for laypeople such as the respondent or their manager would only provide a narrative interpretation of the results.
 - The *International Guidelines on Computer-Based and Internet-Delivered Testing*⁵ also require the provision of interpretations that are suitable for the respective audience. Producing reports for different audiences is much more feasible for practitioners when using computer-generated expert reports.
 - The statements included in each report version can be written so that the technical and linguistic levels are appropriate for the audience they are aimed at. This means the practitioner is not facing the challenge of finding different ways of describing the results to suit the audience.

Quality of the content

- **Consistent interpretation:** Using expert reports ensures consistent interpretation quality for each administration of the questionnaire. This is important to ensure objectivity and the absence of bias in the application of the questionnaire.
- **Knowledge and expertise embedded in expert reports:** The combined knowledge of experts – occupational psychologists with many years experience and in-depth knowledge of the instrument – that goes into preparing the statements contained within expert reports ensures a very high standard of profile interpretation. This provides the opportunity to explore complex score combinations, by generating statements related to scores obtained from two or even three scales, thereby enhancing depth of interpretation.
- **Ability to include derived scores:** Expert reports also allow the practitioner to include *derived scores*. Derived scores predict certain outcome variables such as leadership, creativity or occupational interests based on the scores obtained from the personality assessment. The computations to derive these scores are based on research into the link between personality and the outcome variables. Reporting derived scores allows the practitioner to use the personality assessment to go beyond understanding and predicting the candidate's behaviour: it also provides the opportunity to relate the results to additional information. This information can be very useful when supporting the candidate in developing an understanding about how personality may influence aspects of their work life, such as job performance or success in managerial roles. The following two examples illustrate that supplying derived scores is a clear advantage of expert reports and cannot be substituted, even by the most careful interpretation of personality results from a very experienced practitioner.
 - The *16PF Interpretive Report* offers not only an interpretation of the respondent's personality, but also reports an individual's score on the Holland Themes, a *derived score* that relates personality to occupational interests.

⁵ International Test Commission, 2006

- The *16PF Management Potential Report* considers five broad dimensions important to managerial success: Leadership, Interacting with Others, Making Decisions, Initiative and Personal Adjustment. Within each dimension, the individual's scores on personality factors related to the respective dimension are provided. However, the added value of this report is that it also reports *derived scores* that link personality to, for example, leadership style, creativity and emotional adjustment, based on previous research into the link between personality and these criteria. The report therefore supports the practitioner in interpreting a respondent's personality in the light of behaviour relevant to management potential, and provides crucial information to help the respondent understand how their personality impacts on their potential success as a manager.
- **Links to research:** A very useful feature of expert reports is that they can provide a *narrative interpretation* of the respondent's results using previous research on the link between personality and external criteria. This dramatically enhances the insights gained and goes beyond just learning about the respondent's personality. For example, based on previous research, the results of a personality assessment can be related to particular aspects of interest to the practitioner and the respondent, such as career development and management potential. For instance, the *16PF Career Development Report* describes a respondent's personal strengths anchored to five important areas of behaviour: Problem-Solving Resources, Patterns for Coping with Stressful Conditions, Interpersonal Interaction Styles, Organisational Role and Work-Setting Preferences and Career Activity Interests. The interpretations provided in the report are founded on 35 years of research and consulting experience about the links between personality and these five aspects of behaviour at work. It therefore offers a level of interpretation that cannot be provided in a hand-written report, not even by the most knowledgeable and experienced practitioner.
- **No risk of bias:** Another important advantage of expert reports is that they are, by their very nature, not biased with regard to gender, age, race etc. Their objectivity about these characteristics can be guaranteed because the interpretation of the profile follows unchanging rules and the report is produced 'blind'. This also complies with the ITC guidelines,⁶ which require interpreting results in a manner that eliminates any stereotyping that may pertain to members of the respondent's group (eg cultural group, age, social class, and gender).

Disadvantages of expert reports

For all the many advantages of expert reports, there are some disadvantages, which should also be highlighted:

- The practitioner is dependent on the range of reports available for a particular psychometric instrument and the content provided in the respective report.
- The mode of administration is usually limited, because to be able to generate expert reports the respondent must complete the questionnaire via a computer-based administration. This is only a problem on the rare occasions where access to a computer or online availability is restricted. This can be overcome by using a Scoring Bureau service which can generate expert reports from paper-and-pencil administrations.

In summary, the multiple and clear advantages of expert reports clearly outweigh the minor disadvantages.

Taking expert reports a step further

Considering the clear advantages of expert reports, it is not surprising that a large amount of effort has been invested to further enhance expert reporting capabilities. One feature that has been of particular interest and value to practitioners is to customise the structure and content of reports. This enables the practitioner to decide which sections should be added or removed as appropriate for the audience and context of the assessment – resulting in a tailored report that is fit for purpose. It offers the flexibility of a hand-written report, thereby overcoming one of the disadvantages of expert reports whilst still offering all of the advantages of an expert report.

An example of tailored reporting that offers the 'best of both worlds' is the *16PF Competency Report Suite* based on the 16PF personality questionnaire. The options for tailoring the *16PF Competency Report* allow the practitioner to define the number of competencies and the report content, as well as the order in which the competencies are presented.

⁶ International Test Commission, 2006

How can results from a personality questionnaire be used to predict competencies?

The results obtained from the 16PF questionnaire can be used to draw conclusions about somebody's competency potential because personality influences the way we behave, the decisions that we make and the environments that we find most comfortable:

An individual's personality will influence how they go about *applying their skills*. For instance:

- Do they make cautious decisions, or are they more impulsive?
- Are their decisions based purely on detached logic, or do they take into account the needs and feelings of others?
- Are they confident in their opinions, or will they stay quiet even when they know better?

Interpersonal skills are also greatly influenced by personality. The expression of an individual's interpersonal skills can have a crucial influence on their activities within a team, or their fit to a role that may involve high levels of contact with clients or members of the public. For instance:

- Do they tend to enjoy working with others, or on their own?
- Are they trusting and unsuspecting, or do they question other people's motives?
- Are they warm and interested in others, or more detached?

Personality becomes even more important as somebody enters managerial or leadership roles. Here personality will have a clear effect on the *leader's style*. For instance:

- Will they be structured and organised, or more flexible and open in their style?
- Will they embrace change, or do they prefer stability? How will they respond to pressure?
- Do they want to influence others, or are they content to be influenced themselves?

Assessing personality and linking it to competency potential means that the practitioner can answer some of these questions. This allows organisations to make the right selection decisions by asking the right questions at interview. The *16PF Competency Report* also enables the practitioner to identify and consequently address any areas where otherwise strong candidates may struggle, and to provide focused support to enable them to flourish. Similarly, when used in the context of development, the Competency Report can demonstrate the strengths and areas of development that an individual has related to a set of competencies. This can be the starting point for thinking about what an individual needs to work on to progress professionally.

In particular, the *16PF Competency Report Suite* embodies two main advantages of expert reports:

1. It provides high-quality content that is based on a comprehensive statement library. These statements were produced by a team of experts who contributed to the development of the report.
2. It offers the possibility of reporting and interpreting derived scores based on the personality profile. In the case of the 16PF Competency Report, personality is related to competency potential, indicating somebody's strengths in different areas based on their personality assessment.

The *16PF Competency Report Suite* also offers aspects of the flexibility of hand-written reports:

1. Reports can be fully tailored to fit an organisation's competencies, or clients can select from OPP's framework of generic competencies to map onto their organisation's existing competencies.
2. Development tips or interview questions most suitable for the specific requirements can be specified.

There are several degrees of flexibility for the 16PF Competency Report:

Off-the-shelf reports

- Allow the client to choose from those competencies from OPP's generic competency framework that best reflect the organisation's competencies.

Tailored reports

- Allows the client to make any number of changes to suit the needs of the organisation, eg renaming the competencies to fit their competency model.

Fully bespoke reports

- Allow the client to modify the Competency Report to include new content based on their competency model. It is also possible include content from any of OPP's other reports, or even new custom-written information.

Summary

Expert reports are a practical and cost-effective way of supporting the practitioner in providing feedback to respondents. They have also increased the value of psychometric assessment for practitioners, managers and respondents by offering in-depth interpretation and sophisticated graphical presentation of the results. The increasing popularity of expert reports goes to show that practitioners increasingly believe that the quality of information that can be *reported from a personality assessment* is just as important as the *quality of the instrument itself*.

Using tailored reports overcomes one of the shortcomings of expert reports by offering greater flexibility to practitioners. This enables the practitioner to get the 'best of both worlds': a report that offers in-depth interpretation of psychometric instruments, whilst also allowing adaptation of the content to suit the context of the application and the requirements of the organisation.

Interested in learning more?

For more information on using expert reports, the 16PF Competency Report Suite, for tailored reporting options, or for technical support using existing products, visit www.opp.eu.com or contact Customer Services at 0845 603 9958.

References

- British Psychological Society (2005). *Code of good practice for psychological testing*. Leicester: Author.
- BPS Steering Committee on Test Standards (1995). *Psychological Testing: A User's Guide*. Leicester: The British Psychological Association.
- Derous, E., Born, M. Ph., & De Witte, K. (2004). How Applicants Want and Expect to Be Treated: Applicants' Selection Treatment Beliefs and the Development of the Social Process Questionnaire on Selection. *International Journal of Selection and Assessment*, 12(1-2), 99-119.
- International Test Commission (2006). International Guidelines on Computer-based and Internet-Delivered Testing. *International Journal of Testing*, 6(2), 143-171.